



## Tourism Niche Study: Edu Tourism

2020

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# 1. Methodology

This report provides an overview of the tourism trends and patterns amongst visitors who selected education as their main purpose of visit to the Western Cape. The findings will illustrate key visitor trends obtained from the regional visitor tracking survey. In addition, the report aims to provide tourism market insights from qualitative sources for greater awareness of the Edu Tourism market.

*Responses to the regional visitor tracking surveys are used as a proxy to indicate the key trends within the Western Cape and the various regions. It is important to note that absolute figures cannot be determined from these surveys, as the survey responses are a sample of the tourists into the respective tourism offices across the Western Cape, and would thus represent a sample of the visitors. Therefore, where statistically relevant absolute numbers may be given, however, a share is provided to indicate the trend. This is based on international best practice in the use of surveys within the tourism industry for determining key trends.*

**Definition: Tourist:** refers to any visitor travelling to a place other than that of his/her own environment for more than one night, but less than 12 months and for whom the main purpose of the trip is other than the exercise of an activity remunerated for from within the place visited.

## 2. Participation and sample size

In 2019, a total of **17,727** responses to the regional visitor tracking survey were received from the respective Tourism Offices in the Western Cape. Close to 2,5% of these respondents listed education as their main purpose of visit. This report focuses on the **445** respondents whose main purpose of visit was for education, from the following participating regions:

Cape Garden Route	64
Cape Karoo	5
Cape Overberg	64
Weskus	211
Winelands	96
Cape Town	5



### 3. Overview of Edu Tourism

- The United Nations World Tourism Barometer (UNWTO) defines Education Tourism as “covering those types of tourism which have as a primary motivation the tourist’s engagement and experience in learning, self-improvement, intellectual growth and skills development. Education Tourism represents a broad range of products and services related to academic studies, skill enhancement holidays, school trips, sports training, career development courses and language courses, among others.”
- According to the Centre for the Promotion of Imports from developing countries (CBI) this is a niche market that is dominated by youth travellers who have a lot of time, little money and a desire for experiential travel. The World Youth Student and Educational (WYSE) Travel Confederation determines that global student travel market can be valued at \$33 billion and represents 23% of the global travel market.
- Taking into account the share of national students going abroad, European countries offering the most potential in Edu tourism are Slovakia, Estonia, Ireland, Latvia, Austria, and Greece.
- Experiential travel and the rise of digital nomads offer opportunities for Edu tourism. Millennials and Gen-Z travellers are increasingly seeking out destinations which offer personal growth experiences. According to the World Youth Student and Educational (WYSE) Travel Confederation roughly half of millennial and Gen-Z travellers are undertaking experiential travel such as work abroad, language study, higher education, au pairing, and volunteering. These experiential youth travellers generally stay longer and spend more.
- Millennials are the leading travel group to South Africa. More than half of international tourists who visited South Africa in 2019 were between the ages of 18 and 34 years and 47% of domestic travellers fall in this age category.
- With more companies allowing their employees to work remotely, the COVID-19 pandemic has enhanced the possibilities for remote working and digital nomadism and offers greater opportunities to travel for education while retaining a regular income.
- Cape Town offers an abundance of natural beauty and wide open spaces along with the infrastructure required to facilitate remote working, making it a great location for digital nomads seeking educational travel experiences in the post-COVID world.



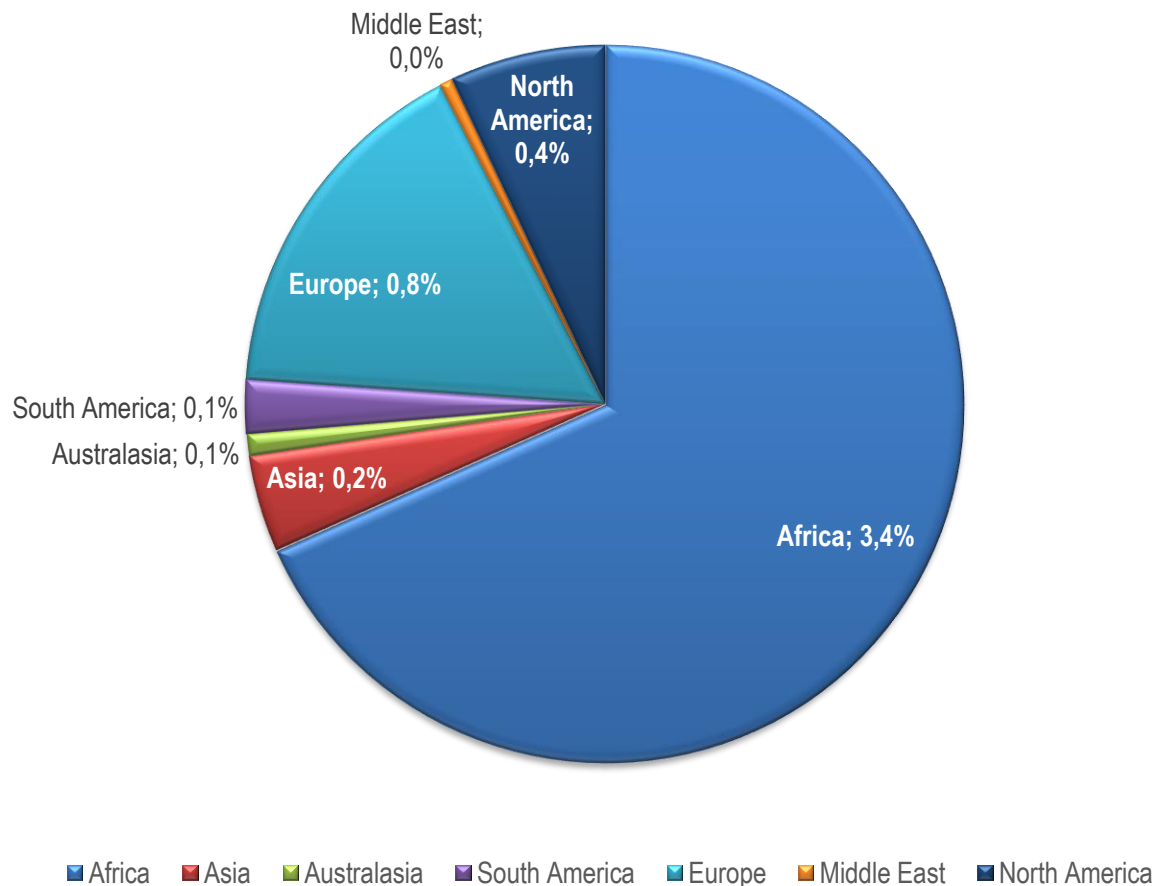
A scenic view of a coastal town built on a cliff overlooking the ocean. The town features several large, modern houses with white walls and red roofs, nestled among lush green trees. The cliff face is a mix of green vegetation and exposed reddish-brown rock. The ocean is a deep blue, with white waves crashing against the rocks at the base of the cliff. The sky is a clear, bright blue with a few wispy clouds.

# Edu Tourism Visitor Trends Analysis

## 4.1 Edu Tourism Activities in South Africa

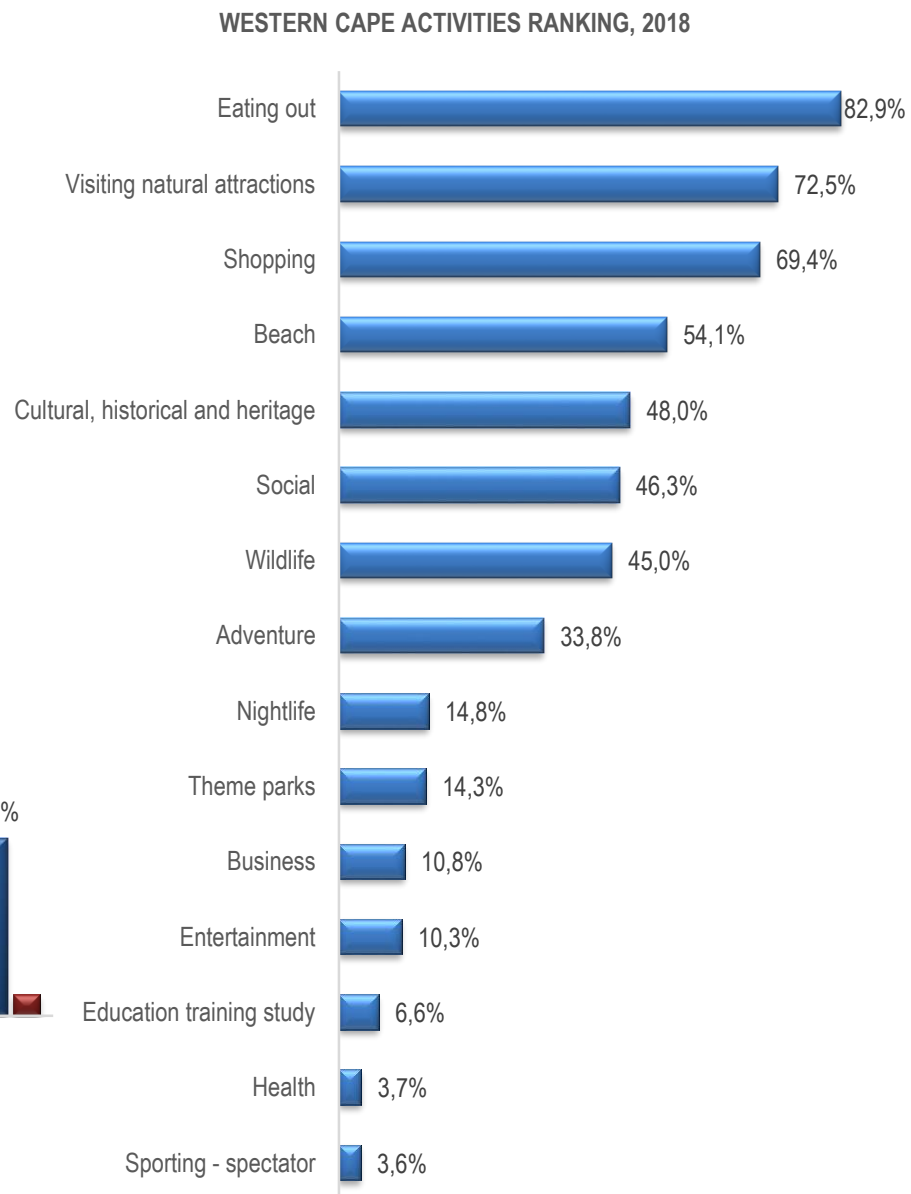
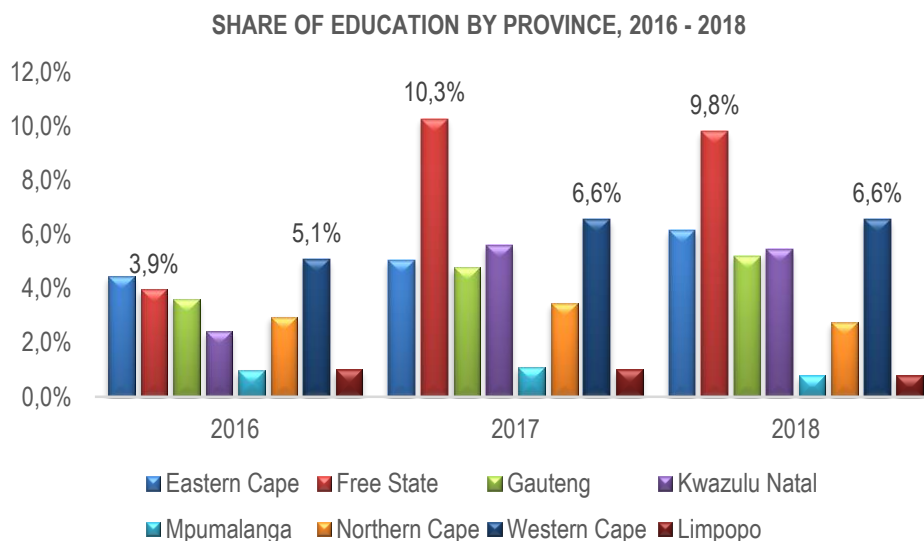
- Visitors engaging in Edu tourism in South Africa are predominantly from the African region. The top ten countries who travelled to South Africa for Education are: Lesotho, Zimbabwe, USA, Namibia, Swaziland, Germany, UK, Botswana, Malawi, and India.

VISITING FOR EDUCATION IN SOUTH AFRICA BY REGION, 2019



## 4.2 Edu Tourism Activities by Province

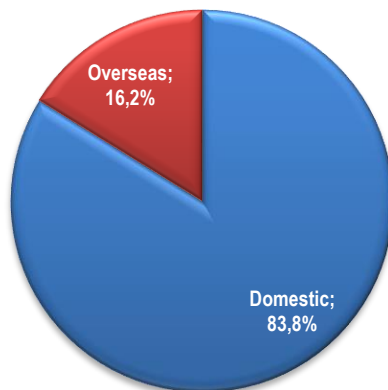
- By province, the Western Cape held the second strongest share of international tourist arrivals who indicated education as their top activity. As reflected in the figure below, the Western Cape ranked as the top province for education in 2016.
- In addition Education ranked amongst the top 15 activities undertaken by SAT survey respondents in the Western Cape in 2018.



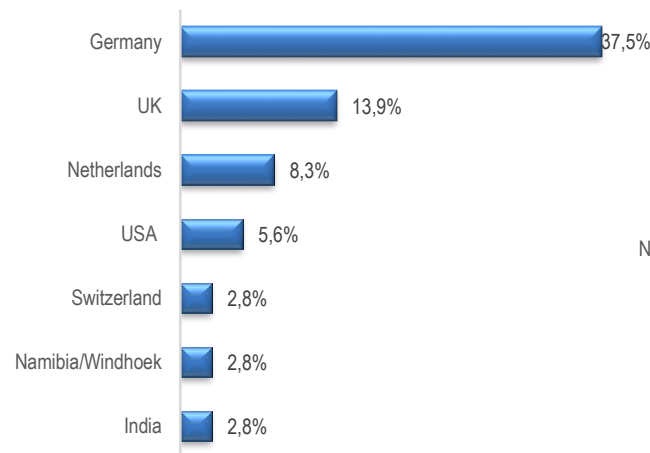
## 4.3 Edu Tourism Activities in the Western Cape

- Domestic travellers make up the majority of visitors travelling to the Western Cape for the purpose of education, with 83.8% of survey respondents who selected education as their main purpose of visit originating from the domestic market and 16.2% coming from overseas markets.
- As the leading source region for the Western Cape, Europe continues to dominate amongst overseas travellers with 4 out of the top 7 international markets travelling for education originating from the continent.
- The Western Cape's top North American market, the United States, also ranked in the top 7 markets in this category.
- From the domestic market, the Western Cape (76.1%), Eastern Cape (3.2%) and Gauteng (2.1%) ranked as the top three source provinces for visitors travelling for the purpose of education.
- The high percentage share coming from the Western Cape indicates that many locals are travelling to different regions within the province for the purpose of education and by extension engaging in tourism activities.

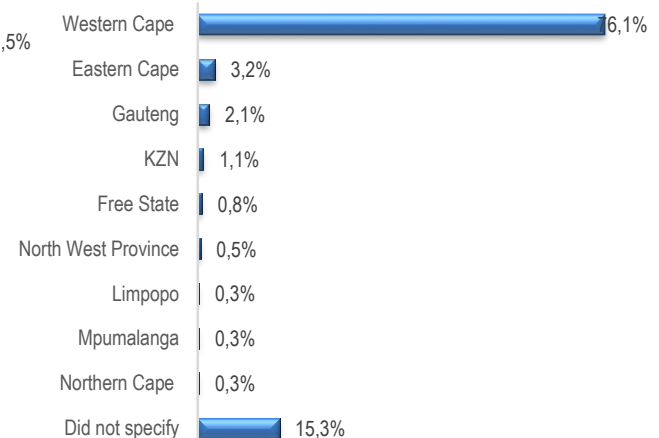
ORIGIN OF VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



TOP INTERNATIONAL SOURCE MARKETS TO THE WESTERN CAPE, 2019



% SHARE OF DOMESTIC SOURCE MARKETS TO THE WESTERN CAPE, 2019

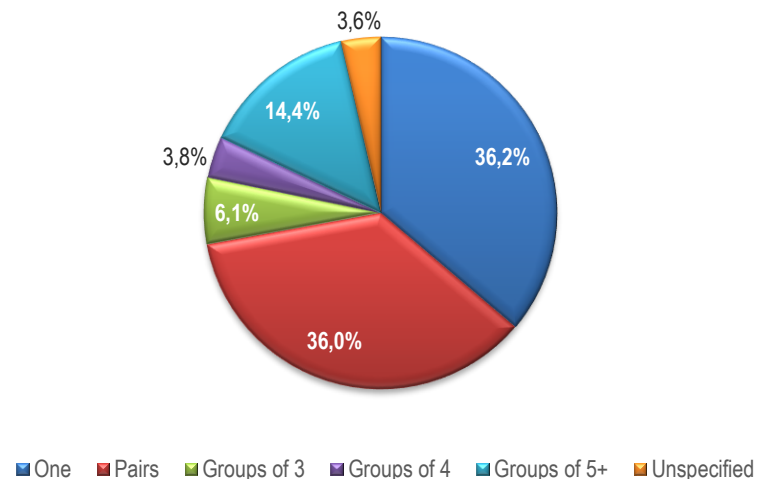




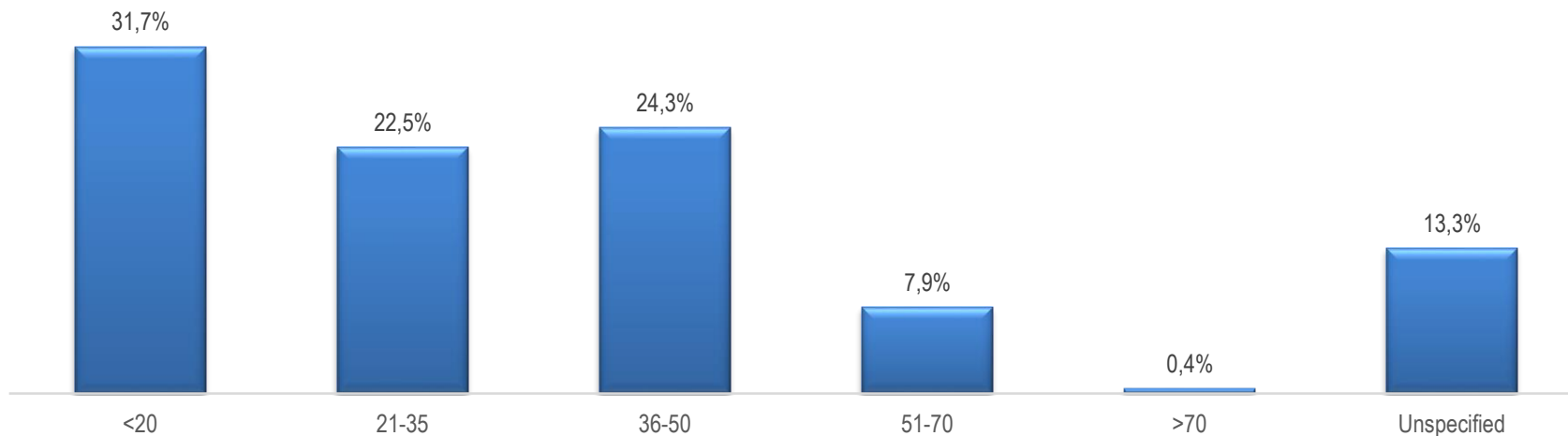
## 4.4 Western Cape Edu Tourism Visitor Trends

- The majority of respondents whose main purpose was education indicated to have travelled alone (36,2%), in pairs (36%) or in groups of five or more (14,4%).
- Close to a third of respondents who travelled for education indicated to be younger than 20 years and 22,5% were between the ages of 21 and 35 years. A quarter of respondents were in the 36 – 50 years category.
- The proportion of respondents younger than 20 years travelling for education (31,7%) is notably higher when compared to the share of this age category to the province in general (2,4%). It seems that the majority of this age group came to the Western Cape for the purpose of Education in 2019.
- In addition, the proportion of visitors aged 21 – 35 years (22,5%) who travelled for education is significantly higher than the 15,6% portion of 21 – 35 year olds who visited the Western Cape in general.

GROUP SIZE OF VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



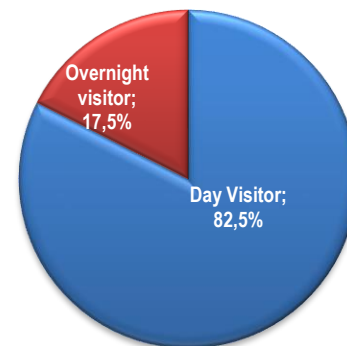
AGE CATEGORIES OF VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



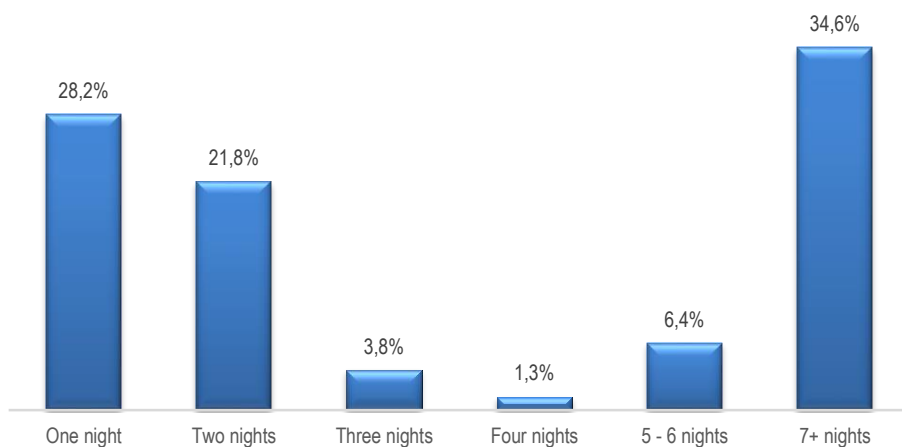
## 4.4 Western Cape Edu Tourism Visitor Trends

- Overall visitors to the Western Cape indicated to be majority overnight visitors, however, those who travelled for education were more likely to go on day excursions throughout the province.
- Those who stayed overnight spent an average of one night (28,2%), or two nights (21,8%) in the province and the highest number of respondents stayed for at least a week (34,6%).
- This trend underlines the Western Cape's desirability for both long stays as well as the popularity of day excursions for locals.
- Property rentals and Airbnb was the top accommodation choice for just over a quarter of respondents visiting for education. Staying with family or friends and B&B accommodation were the amongst the top three choices.

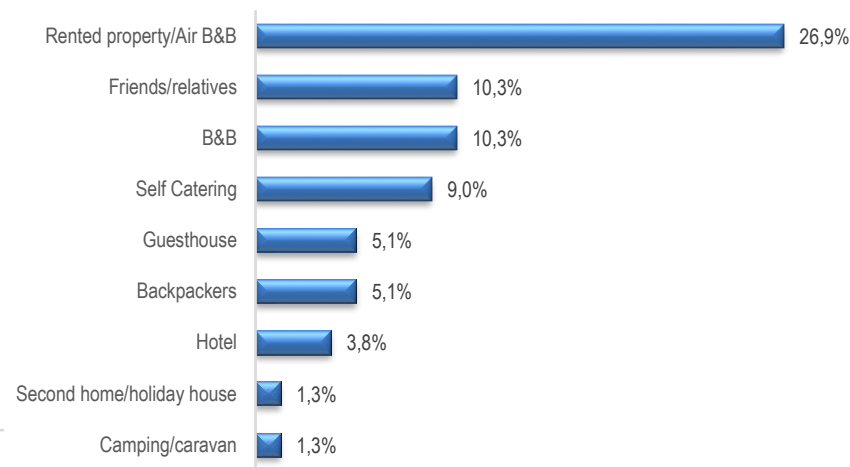
OVERNIGHT & DAY VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



AVERAGE LENGTH OF STAY OF OVERNIGHT VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



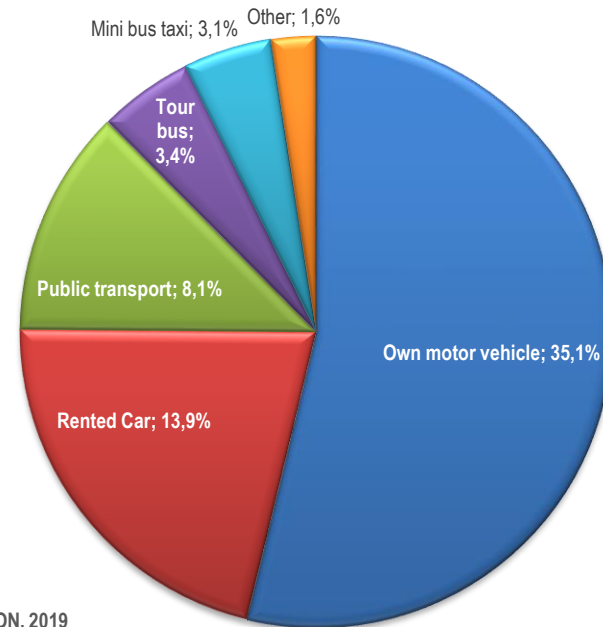
TYPE OF ACCOMMODATION USED BY VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



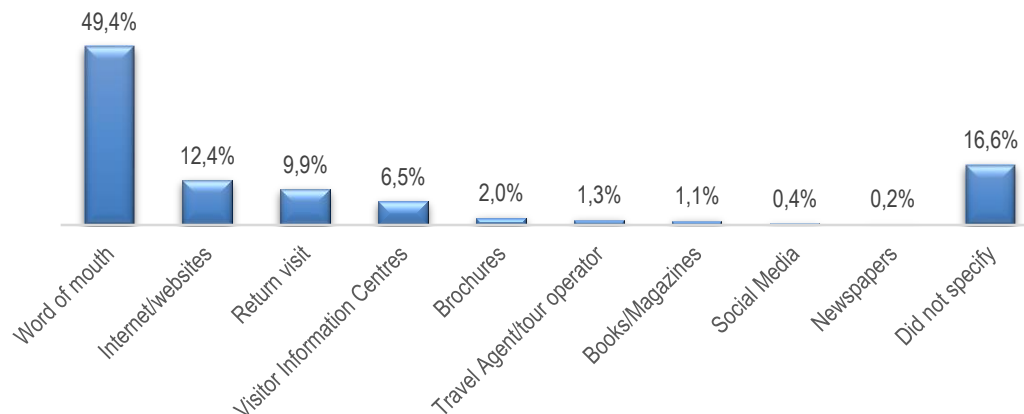
## 4.4 Western Cape Edu Tourism Visitor Trends

- The vast majority of respondents with education as their main purpose of visit travelled with their own vehicle (35,1%) or rented car (13,9%).
- This suggests that visitors who travel to the province for education prefer to explore on their own rather than with a tour guide.
- The University of Cape Town was ranked as the leading University in Africa, according to QS World University Rankings 2021. In addition, Stellenbosch University located in the Cape Winelands ranked in 5<sup>th</sup> place, making the Western Cape an ideal destination for those seeking to travel for education.

MODE OF TRANSPORT USED BY VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



SOURCE OF INFORMATION USED BY VISITORS TO THE WESTERN CAPE FOR EDUCATION, 2019



- According to respondents, word of mouth (49,4%) and the internet (12,4%) holds the greatest return on investment as effective marketing tools.
- From these trends an evident shift can be seen from marketing collateral to online platforms.

## 5. Key Findings

- Experiential travel and the rise of digital nomads offer opportunities for Edu tourism. Millennials and Gen-Z travellers are increasingly seeking out destinations which offer personal growth experiences. According to the World Youth Student and Educational (WYSE) Travel Confederation roughly half of millennial and Gen-Z travellers are undertaking experiential travel such as work abroad, language study, higher education, au pairing, and volunteering. These experiential youth travellers generally stay longer and spend more.
- The Student Youth Travel Association (SYTA) determines that global student travel market can be valued at \$33 billion and represents 23% of the global travel market.
- Millennials are the leading travel group to South Africa. More than half of international tourists who visited South Africa in 2019 were between the ages of 18 and 34 years and 47% of domestic travellers fall in this age category. Visitors engaging in Edu-tourism in South Africa are predominantly from the African region. However, as the leading source region for the Western Cape, Europe continues to dominate amongst overseas travellers with 4 out of the top 7 international markets travelling for education originating from the continent.
- Domestic travellers make up the majority of visitors travelling to the Western Cape for the purpose of education, with 83.8% of survey respondents who selected education as their main purpose of visit originating from the domestic market and 16.2% coming from overseas markets. With around three quarters of domestic travellers coming from the Western Cape, there is a trend that many locals are travelling to different regions within the province for the purpose of education and by extension engaging in tourism activities.
- Close to a third of respondents who travelled for education indicated to be younger than 20 years and 22,5% were between the ages of 21 and 35 years. The proportion of respondents younger than 20 years travelling for education (31,7%) is notably higher when compared to the share of this age category to the province in general (2,4%). It seems that the majority of this age group came to the Western Cape for the purpose of Education in 2019. In addition, the proportion of visitors aged 21 – 35 years (22,5%) who travelled for education is significantly higher than the 15,6% portion of 21 – 35 year olds who visited the Western Cape in general.
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- With more companies allowing their employees to work remotely, the COVID-19 pandemic has enhanced the possibilities for remote working and digital nomadism and offers greater opportunities to travel for education while retaining a regular income.



## 6. List of Sources

- South African Tourism
- Wesgro Primary Research
- 20 Adventure Travel Trends to watch in 2018, ATTA
- CBI (Centre for the Promotion of Imports from developing countries)
- UNWTO
- WYSE



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